CONFERENCE

21st Annual Estate Planning Conference 2020

Estate planning, trust administration and fiduciary litigation

Join us for an update on the key issues, new developments, court trends, and practice tips you need to know about for the upcoming year!

Agenda

- **Recent Developments in Estate Planning, Trust and Estate Administration, and Fiduciary Litigation**
- **Featured Address: Law and Economics of ESG Investing by a Trustee**
  Robert H. Sitkoff, *Harvard Law School, Cambridge*
- **Trust Administration and Investment Management**
  The investment management landscape for trustees is complex and always changing. This panel highlights recent trends for new structures in the bifurcation of roles regarding directed trusteeship and trustee delegation of investment management. The faculty discuss investment assets that present unique administrative issues requiring trustee discretion and judgment—such as when loans to beneficiaries are appropriate and under what terms, the management of trust-owned real estate and expense allocation, and other complexities with respect to the management of trust assets.
- **Estate Planning Considerations for End of Life**
  Hear practical insight on estate planning considerations for clients who have a terminal illness or are otherwise close to the end of their life. The panelists address transfer tax and income tax considerations of so-called death-bed gifts, as well as considerations for how to structure an estate plan for tax and probate purposes in these circumstances. The discussion is relevant both for clients with significant assets where a federal estate tax is likely to be due, as well as for clients with more modest assets.
- **What's Up in the World of Fiduciary Litigation**
  Fiduciary litigation, which traditionally has been based on local law and statutes, has become national in scope with the adoption of a plethora of uniform acts. Massachusetts has not yet developed a body of case law on its Uniform Trust and Probate Codes, but other jurisdictions have. In reviewing cases from around the country, we explore topics such as a trustee's duty to inform and report, fiduciary duties owed to trust settlors and beneficiaries, the validity of wills and the latest on *in terrorem* and spendthrift clauses.
  In addition, the panelists discuss recent Massachusetts cases on the treatment of trusts by MassHealth and in divorce situations. Hear tips for litigators as well as important cautions!

Faculty

Jennifer S. Ewing, Esq., *Ropes & Gray LLP, Boston,* Cochair; Jennifer Locke, Esq., *Goodwin Procter LLP, Boston,* Cochair; Stacy K. Mullaney, Esq., *Fiduciary Trust Company, Boston,* Cochair; Robert H. Sitkoff, Esq., *Professor, Harvard Law School, Cambridge,* Featured Speaker; Kristin T. Abati, Esq., *Choate Hall & Stewart LLP, Boston;* Mark J. Esposito, Esq., *Shatz, Schwartz, and Fentin, PC, Springfield;* Anthony L. Galvagna, Esq., *Bank of America, Boston;* Jillian B. Hirsch, Esq., *Hirsch Law LLC, Newton;* Anne Katsas, Esq., *Port Estate Planning LLC, Newburyport;* Michael T. Lahti, Esq., *Fletcher Tilton, PC, Worcester;* Melissa F. Langa, Esq., *Bove & Langa, PC, Boston;* Suma V. Nair, Esq., *Goulston & Storrs, PC, Boston;* Christopher D. Perry, Esq., *The Northern Trust Company, Boston;* Marshall D. Senterfitt, Esq., *Goulston & Storrs, PC, Boston;* Patricia Schatzlein Smock, Esq., *Fiduciary Trust Company, Boston*

Dates & Locations

BOSTON
Tuesday, April 28, 2020
9:30 am–4:30 pm

MCLE Conference Center,
10 Winter Place, via Winter Street
Program Number: 2200136P01

LIVE WEBCAST
Tuesday, April 28, 2020
9:30 am–4:30 pm

Register at **www.mcle.org**
Program Number: 2200136WBC

RECORDED WEBCAST CC
Tuesday, May 12, 2020
9:30 am–4:30 pm

Register at **www.mcle.org**
Program Number: 2200136RBC

Tuition *(includes written materials)*

- $275
- $247.50 MCLE Sponsor Members
- $206.25 New Lawyers admitted to law practice after 2017, Pending Admittees, Law Students, and Paralegals

Materials

The materials for this program include MCLE's *Massachusetts Probate Law Sourcebook 2020*, which can be downloaded via the link emailed to you. Attend in person to get a print copy.

Also, there is no need to take extensive notes. Two weeks after the live seminar, all registrants receive a link to a written verbatim transcript of this program.

Can't Attend?

View the webcast—live or later, or download the mp3 recording at **www.mcle.org**

Listen to the Audio CD
Available after Tuesday, May 12

- $165
- $148.50 MCLE Sponsor Members
- $123.75 New Lawyers admitted after 2017

Earn up to 5.5 CLE credits